

STEP THREE: STUDENT AND PARENT INCOME

Complete the questions with gross taxed and untaxed income you and your family expect to receive from January 1, 2009, until December 31, 2009. Estimate amounts as best you can. The more accurate your estimated amounts, the more accurately the Financial Aid Office can estimate your aid eligibility.

	Student	Parent(s)
12. Will you use a 1040, 1040A, or 1040EZ?	_____	_____
13. Total number of exemptions	_____	_____
14. Adjusted gross income (AGI), which is gross income (including wages, interest, capital gains, and income from retirement accounts) minus your maximum allowable adjustments. AGI is the amount at the bottom of page 1 of your federal tax form (IRS Form 1040 or 1040A)	\$ _____	\$ _____
15. U.S. income tax paid (Report amount withheld or paid in advance, subtracting any refund or adding any amount due upon completion of federal tax return. Do not include self-employment tax.)	\$ _____	\$ _____
16. Income earned from work (Include wages, salaries, tips, includible in gross income, and net earnings from self-employment.)	\$ _____ (Student)	\$ _____ (Father)
		\$ _____ (Mother)
17. Untaxed Social Security benefits (for parents and all household members)	\$ _____	\$ _____
18. Payments to tax-deferred pension and savings plans, including but not limited to amounts on W-2 in Boxes 12 or 14	\$ _____	\$ _____
19. Child support received for all children	\$ _____	\$ _____
20. Earned income credit (IRS Form 1040, line 64a) or additional child tax credit (IRS Form 1040, line 66)	\$ _____	\$ _____
21. Other untaxed income, such as disability, earned income credit, additional child tax credit, untaxed portions of IRA distributions and pensions, or welfare benefits	\$ _____	\$ _____
22. Child support paid in 2009 because of divorce or separation	\$ _____	\$ _____

STEP FOUR: STUDENT AND PARENT ASSETS

Complete with the correct market value or net worth (value minus debt) for each type of asset.

23. Cash, savings, and checking accounts	\$ _____	\$ _____
24. Net worth* of home/primary residence	\$ _____	\$ _____
25. Net worth of investments (excluding retirement accounts)	\$ _____	\$ _____
26. Net worth of other real estate (do not include home/primary residence)	\$ _____	\$ _____
27. Net worth of business and/or investment farms (Do not include a farm that you live on.)	\$ _____	\$ _____
28. Does business employ more than 100 people?	Yes _____	No _____

* Net worth = current value minus remaining debt.

STEP FIVE: OPTIONAL INFORMATION

29. Are you Hispanic or Latino? ("Hispanic or Latino" is defined to mean a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.) ___Yes ___No

30. Are you from any of the following racial groups? (Check one or more.)

American Indian or Alaska Native Native Hawaiian or Other Pacific Islander Black or African American

Asian White

STEP SIX: CERTIFICATION

Please date and sign. Your signature indicates that information in this form is as accurate as possible and that you understand that you will be required to submit additional information to update or verify any estimations made on this form. Corrections or changes may change financial aid eligibility.

31. Student signature _____ Date _____

32. Parent signature (A parent from Step 3) _____